

WELFARE TO WORK VOUCHER PROGRAM

STRATEGIC PLANNING GUIDE

DEVELOPING AN ANNUAL STRATEGY FOR YOUR WtW PROGRAM

WHY A STRATEGY?

Research studies show that two simple actions can dramatically increase the likelihood of your program's success:



(1) establishing specific, measurable goals and (2) writing them down.



That's right! You probably already know that setting goals is a good idea but studies actually show that the act of writing the goals down dramatically increases the chance that you will achieve them. HUD has asked Welfare to Work (WtW) technical assistance providers to assist each WtW PHA to create a strategy for the coming year and to record that strategy in a written Action Plan. This package is designed to assist with that goal setting/action planning process.

WHAT CAN THIS PROCESS DO FOR ME?

As noted above the main purpose of setting goals and developing a strategy is to enhance the probability of success for your program. But in addition to that, we see the planning process as:

- A way to get others focused on helping you succeed. It is a way to get HUD's attention and to help you make a case locally for the resources and support that you need.
- An important step in documenting your program's progress and success
- A way to focus technical assistance on your priorities.

WHAT IT'S NOT:

Sometimes knowing what something is NOT helps us understand what it is. This process is not: (1) a new HUD reporting requirement, (2) a formal evaluation of your WtW program, or (3) a document to be used for HUD monitoring purposes.

TOOLS TO HELP WITH THE PROCESS

- WtW Strategy Checklist with questions that will help you think about where your WtW program is now, what types of changes you might want to make, and what kind of goals you may want to establish.
- Strategic Plan template for recording your goals, sharing them with others in your agency, and tracking your progress in meeting those goals.
- Your TA provider is available to help think through strategies and to connect you with other valuable resources.
- Helpful tips (attached) on establishing and prioritizing goals.

SCHEDULE FOR THIS PROJECT

- *10/29/01 - 11/26/01:* You will meet with your TA Provider via teleconference to begin developing a customized WtW strategy for your site. HUD Field Office staff may join in on these conversations.
- *11/19/01 - 11/30/2001:* You will be invited to participate in a regional conference call, which will be scheduled and facilitated by your TA Provider. The purpose of this call is for WtW sites in the same area/region to share ideas and resolve challenges related to the strategic planning process. Again, HUD Field Office staff may join in on these conversations.
- *12/03/01 - 12/14/01:* Your TA Provider will be available to assist you in fine-tuning your strategic plan, if needed.
- *12/14/01:* We ask that you send your completed strategy to your TA Provider.



SECTION 8 WELFARE TO WORK PROGRAM STRATEGY PLANNING CHECKLIST

In each of the subject areas below (1) consider the current condition of your welfare to work program, (2) identify the changes you want to consider and (3) develop goals or action steps based upon your analysis.

I. LEASING

III. A. Questions to stimulate thoughts about goals and actions in this area:

Total authorized units	
Number and % under lease	
Current utilization rate	
Current participant success rate	
Current turnover rate	
No of units expected to be leased in the coming 12 months	
Average number of search months	

- **Do we want or need to select participants in a different way in the coming year?** Think about both the number of participants you will need in the coming year and the characteristics of participants who can benefit from the program. What was the primary source of participants in the past 12 months? (e.g., PHA waiting list, referrals from another agency, etc.) Has the selection process generated a sufficient number of the appropriate kinds of participants?
- **Do we want or need to make program changes based upon market conditions?** How has the local housing market affected WtW implementation? What challenges existed in encouraging landlords to participate? Do you expect the market to be different during the coming year? Are payment standards and utility allowances adequate?
- **Do we want or need to work differently with landlords during the coming year?** Are payments correct and on-time? Do we need to consider an incentive program to reach new landlords? What would it take to encourage new and already active landlords to make available housing in non-traditional neighborhoods?

B. Identify Goals and Action Items (After considering the above questions, identify specific goals and action items for the coming year.)

Goals and Action Items:

Goal #1: Maintain a utilization rate of ____ percent.

Action Items:

- ✓ Lease up ____ units by (date)
- ✓ Continue to issue ____ vouchers per month based upon ____ turnover per year

C. What information or technical assistance would assist you in achieving these goals?

II. HELPING WtW FAMILIES TO BE SUCCESSFUL



A. Questions to stimulate thinking about goals and actions in this area:

Authorized number of participants	
Current Number of participants	
Active participants who are working	
Active participants not working but participating in preparatory training	
Active participants neither working nor in training	

Do we want or need to change the focus or design of the WtW program? What are the characteristics of families participating in WtW? (e.g., working, not working, homeless etc.) Are the families different than the original design anticipated? Does the program have a clear definition of "success" that distinguishes WtW participation from the regular Section 8 program? Does progress to date suggest the program actually is working to assist families in transition from welfare to work?

Do we want or need to change the approach to working with families? Have families participated actively in WtW activities? Have they been successful? Have you been able to track the progress of WtW families satisfactorily? Do current participant obligations appropriately reflect expectations for families? Are families complying with participant obligations?

Do we want or need to make changes in the type of services or resources being offered or how they are provided? Do the services being provided by your partnership match the needs of participants? Do any crucial services seem to be lacking? What services have been used most and least by current participants? Does there seem to be a correlation between whether participants use the services and whether they become employed or achieve some other indicator of self-sufficiency?

Do we want or need to improve the connection between the WtW program and local employers? Does the WtW program have visibility with major employers in the area? Do the services and resources provided assist participants in obtaining skills that are valued by employers? What challenges do participants face in gaining employment? What challenges does the partnership face in placing participants with employers?

B. Identify Goals and Action Items (After considering the above questions, identify specific goals and action items for the coming year.)

Goals and Action Items:

C. What information or technical assistance would assist you in achieving these goals?

III. PARTNERSHIP AND ADMINISTRATIVE CHALLENGES



A. Questions to stimulate thoughts about goals and actions in this area:

Do we want or need to improve the workings of the WtW Partnership? Are all partners active and providing the agreed-upon services? Is communication and coordination among the partnerships adequate? What improvements could be made how the partnership conducts business, communicates or shares resources?

Do we want or need to improve internal PHA coordination and support re: the WtW program? Is the WtW Program appropriately covered in PHA documents (e.g., Administrative and PHA plans)? Are PHA staff aware of key differences for the WtW program? Are changes needed or expected in the current level of support for the program?

Have we been able to track the progress of WtW families and program outcomes satisfactorily?

Do we want or need to focus attention of the broader community on the WtW Program? Is the community aware of WtW as a separate program; should it be? Has the PHA maximized opportunities to share success stories? Are there opportunities for garnering additional community support or resources for the program?

B. Identify Goals and Action Items (After considering the above questions, identify specific goals and action items for the coming year.)

Goals and Action Items:

C. What information or technical assistance would assist you in achieving these goals?

WELFARE TO WORK STRATEGIC PLAN
January 1, 2002 – December 31, 2002

Goals & Actions	Key dates	Lead	Strategy and Success Measures
Leasing			
Participant Success			

Goals & Actions	Key dates	Lead	Strategy and Success Measures
Partnership/Administrative			